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# TECHNICAL PAPER

## Student-Focused Funding

## 2000-2001

**MARCH, 2000**

**Ministry of Education**

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# INTRODUCTION

## PURPOSE

This paper contains details of the grant formulas and other criteria for Student-Focused Funding for 2000-01. It is intended to provide stakeholders in education with an overview of the formulas school boards use to calculate their allocation for the 2000-01 school year for budgeting and financial reporting purposes.

The grant formulas outlined in this document are included in the 2000-01 Student-Focused Funding Legislative Grants Regulation, the Calculation of Average Daily Enrolment for 2000-01 Regulation, and the Calculation of Fees for Pupils for 2000-01 Regulation.

## CHANGES FOR 2000-01

A summary outline of the changes from the 1999-00 student-focused funding approach is provided below with detailed outlines in the relevant sections of this paper.

### Enhancements to address cost pressures and support responsible collective agreements

The Foundation Grant and most special purpose grants have been enhanced to recognize increasing costs. The salary and benefit benchmarks for teachers and most categories of non-teaching staff have been increased by 1.95%.

One key purpose of these enhancements is to help boards reach responsible collective agreements. Boards retain flexibility concerning how to use these enhancements. The adjustments address benchmarks for average costs. Boards' actual costs for salaries and benefits will vary and can continue to vary from these benchmarks, so long as boards remain in compliance with the expenditure enveloping and other requirements of the *Education Act* and regulations for financial accountability.

It is important to note that most of this new funding is an enhancement to classroom funding. The increases to the various grants also affect the attribution of grants to expenditure categories, with the result that the grant-by-grant distribution of classroom and non-classroom funding has also been adjusted.

### Special Education

The Special Education Per Pupil Amount (SEPPA) will be maintained at the 1999-2000 level. The enhancement of $30M in 1999-00 was added as a transitional measure to allow boards to address the needs of new students, since the Intensive

Support Amount (ISA) funding was held stable to allow a review of refined ISA eligibility criteria. This enhanced level of SEPPA will be continued in 2000-01 and future years.

The SEPPA portion of the allocation has also been enhanced to reflect the increases to salary and benefit benchmarks and teacher adviser time at the secondary level. Increases attributable to staff salaries and benefits in ISA funding have also been included in the SEPPA portion of the allocation (rather than by adjusting per-pupil amounts for ISA), to provide boards flexibility within the special education envelope.

In 2000-01, SEPPA funding will be $376 per elementary student and $243 per secondary student.

Boards will submit ISA claims for the 2000-01 school year, using the eligibility criteria tested in 1999-00. If a board's eligible claims generate more ISA funding than in 1999-00 (net of portability adjustments), its ISA funding will increase to match its incidence of eligible high-needs students.

In 2000-01, if a board's eligible claims generate less ISA funding than it received in 1999-00 (net of portability adjustments), its ISA funding in 2000-01 will be maintained at the 1999-00 level (net of portability adjustments). This is a transitional measure for one year, to allow boards to plan for special education supports in future years within available funding.

Eligibility requirements for the Special Incidence Portion (SIP) have been made more flexible, by eliminating the requirement that a student claimed for SIP must also be claimed as eligible for ISA 3.

**English as a Second Language**

The per-pupil funding for students coming from outside of Canada has increased from $2,235 to $2,672. Over three years, per-pupil funding for eligible students will be $5,077.

The allocation based on statistical data concerning children who do not speak English nor French at home has been increased from $18M to $21M.

**French as a First Language**

The French as a First Language Grant has been increased by $10M to help French boards meet the challenges of educating their students in predominantly English-speaking communities.

**Language Instruction (Perfectionnement du Français)**

French-language boards will benefit from a per-pupil increase in PDF equivalent to the increase for ESL – from $2,235 to $2,672 per pupil.

**Investment in Principals**

The ministry is providing enhanced funding for principals to boards with a high proportion of small schools. The Geographic and School Authorities Grant will include a new component that will provide an estimated $10M in additional funding. Boards that receive this new funding will have the flexibility to use it to provide more principals or to increase the time that part-time principals can spend in their principal duties.

This funding will complement the funding for principals already recognized in the Foundation Grant and in the Small School Grant.

**Literacy and Numeracy Programs under the Learning Opportunities Grant**

In March 1999, the ministry introduced funding for Grade 8 summer school, to provide additional supports to students at risk of not meeting the new standards in the curriculum. For this summer, and next year, the government is significantly expanding the scope of supports to help students meet the new standards for literacy and numeracy.

This funding will be allocated through a new component of the Learning Opportunities Grant.

Funding will be provided for programs to enhance the literacy and numeracy skills of students at risk of not meeting the standards required for successful completion of the new curriculum and the Grade 10 literacy test. Grade 8 summer school will be continued. Funding will be provided for summer programs, and for programs provided during the school year before and/or after school, for students in Grade 7, 8, 9, and 10. Funding will also be provided for programs for parents of at-risk students, to help them support increased literacy and numeracy at home.

All these programs will be funded at the continuing education and summer school rate. Transportation funding for literacy and numeracy programs for students in the summer has also been increased. Total funding will match the extent to which boards deliver these new programs. The ministry has estimated that these new programs will increase school board allocations by $25M in 2000-01.

The grants for school operations and renewal under the Pupil Accommodation Grant will be provided for these summer school programs for students in Grades 7 to 10.

Phase-in provisions will apply to this component in 2000-01.

These expanded literacy and numeracy programs will also be funded in the summer of 2000, through amendment to the 1999-2000 regulations (grade 8 summer school will continue to be funded). In the 1999-2000 school year, these programs will be funded outside of the phase-in provisions.

**Continuing Education and Summer School - Crossover and transfer courses**

The regulations have been amended to add funding for programs and courses that support secondary students' transfers between academic and applied courses, and for courses leading to partial credits (as provided for in the ministry's secondary schools program and diploma requirements).

An amendment to the 1999-00 grant regulations and ADE regulation has also been made to provide funding for these courses in the summer of 2000.

**Combined Junior Kindergarten and Kindergarten programs**

In the school year 2000-01, school boards will have the flexibility to offer Junior Kindergarten and Kindergarten combined programs in a manner that best meets the needs of the local students. Boards will be able to offer a modified JK and K curriculum that provides for an average of 600 minutes of Junior Kindergarten and 900 minutes of Kindergarten per a 5-day instructional cycle (offered, for example, on a 2 day JK and 3 day SK weekly cycle). For the purpose of the Early Learning allocation, students in combined JK and K programs will be counted as half-time pupils.

**Administration for small boards**

The improvement for the minimum funding level for administration for small boards introduced last year will be further enhanced this year. The refined grant will include a larger fixed base and a diminishing per pupil allocation. This will result in increased funding for smaller boards, totaling $4.5M in 2000-01.

**Trustee election costs in unorganized territory**

Trustee elections will be held in November 2000. In most places in the province, the *Municipal Elections Act* requires municipalities to organize trustee elections as part of the municipal election process, and to meet the costs of these elections. In territory without municipal organization that is included in a school board's jurisdiction (which occurs in northern and remote areas of the province), the Municipal Elections Act requires school boards to meet the costs of elections. The ministry will meet actual election costs in territory without municipal organization, by allowing boards to deduct costs from property tax revenue. Boards will have the flexibility to allow them to enter partnerships with other boards or adjacent municipalities to run elections efficiently.

**Funding for Teacher Adviser Program**

The government has recognized that the Teacher Adviser Program, newly implemented as part of secondary school reform, has an impact on teacher workload. As a result, a new regulation concerning instructional time has been introduced so that teacher adviser duties are recognized as instructional time. The Foundation Grant and other grants have also been adjusted to recognize just over 30 minutes per week of instructional time on average in the calculation of teacher workload.

**Stable funding guarantee**

The one time funding commitment made to ensure that operating revenue to school boards in 1999-00 is equal to or more than the operating revenues in 1998-99 is discontinued in the 2000-01 regulations.

**Phase-in**

Provisions that limited boards' increases in operating revenue to no more than 4% per year (often called "negative mitigation") have been eliminated. All boards will receive their full entitlement to funding under the Foundation Grant and special purpose grants.

**Pupil accommodation grants**

Funding for New Pupil Places will reflect the results of the ministry's review of relocatable classroom modules and leases. Changes as a result of this review are shown in each board's rated capacity, and do not require changes to the grant regulation.

The regulation includes provisions for the removal of the $20 million cap on the allocation for new pupil places if a board has demonstrated that it has begun construction on projects costing at least $200 million since the introduction of student-focused funding, using the New School Facilities Report component of the accountability framework for the Pupil Accommodation Grant.

**OMERS reinvestment**

Most non-teaching employees of school boards are part of the Ontario Municipal Employees Retirement System (OMERS). Because of surpluses in OMERS, school boards (like other employers) will not be required to make pension contributions for OMERS employees during the 2000-01 school year. As a result, boards will have lower expenses for employee benefits than they otherwise would have.

The salary and benefit benchmarks throughout student-focused funding reflect boards' costs for making pension contributions on behalf of these employees.

The government has decided to reinvest the savings from the suspension of employer contributions to OMERS into the enhancements described above. As part of the Estimates forms to be released shortly, the ministry will require boards to provide information that identifies the amount of their OMERS savings. The ministry will recover these savings through a reduction to each board's total student-focused funding allocation and reinvest the savings into enhancements described above. This approach to recovering the savings means that the underlying salary and benefit benchmarks for OMERS employees are not reduced.

**FURTHER INFORMATION**

If you have any questions about the material in this paper, please contact your district office finance officer or the following branches of the Ministry of Education:

| | |
|---|---|
| Education Finance Branch | (416) 325-2830 |
| Business Services Branch | (416) 325-4242 |
| Transfer Payments and Financial Reporting Branch | (416) 325-2038 |

## STUDENT-FOCUSED FUNDING

Student-focused funding consists of a Foundation allocation, nine Special Purpose Grant allocations, and an allocation for Pupil Accommodation as summarized below:

**FOUNDATION ALLOCATION**

- Classroom teacher
- Teacher Assistants
- Textbooks and learning materials
- Classroom supplies
- Classroom computers
- Library and guidance services
- Professional and para-professional supports
- Preparation time
- In-school Administration
- Classroom consultants

**SPECIAL PURPOSE ALLOCATIONS**

1. Special Education
2. Language
3. Geographic and School Authorities
4. Learning Opportunities
5. Adult and Continuing Education
6. Teacher Compensation
7. Early Learning
8. Transportation
9. School Board Administration and Governance

**PUPIL ACCOMMODATION ALLOCATION**

- School Operations
- Facilities Renewal
- New Pupil Places
- Outstanding Capital Commitments
- Debt Charges

# FOUNDATION ALLOCATION

The foundation allocation supports the components of a classroom education that are required by and generally common to all students. $ 7.2B has been allocated for this allocation which consists of the components as tabled below:

| ELEMENTARY | # staff per 1,000 students | | Average salary + % benefits | $ per pupil for supplies and services | $ Allocation per pupil |
|---|---|---|---|---|---|
| Classroom Teacher<br>Class size: 25:1 | Class Tchr.<br>Supply Tchr.<br>Staff development | 40.00<br>0.00<br>0.00 | 50,975 + 12% | <br>83<br>11 | 2,378 |
| Teacher Assistants | | 0.2 | 22,590 + 16% | | 5 |
| Textbooks and Learning Materials | | | | 75 | 75 |
| Classroom Supplies | | | | 77 | 77 |
| Classroom Computers | | | | 43 | 43 |
| Library and Guidance Services | Tchr. Librarian<br>Guidance Tchr. | 1.30<br>0.20 | 50,975 + 12% | | 85 |
| Professional/Para-Professional Supports | | 1.33 | 43,686 + 14.8% | | 67 |
| Prep Time | | 4 | 50,975 + 12% | | 228 |
| In-School Administration | Principal<br>VP<br>Dept. Head<br>Secretary | 2.75<br>0.75<br>0<br>3.67 | 79,296 +12%<br>72,360 +12%<br><br>28,346 +18% | <br><br><br>5 | 433 |
| Classroom Consultants | | 0.48 | 70,171 +12% | | 38 |
| **TOTAL FOUNDATION GRANT** | | **54.7** | | **294** | **3,429** |

| SECONDARY | # staff per 1,000 students | | Average salary + % benefits | $ per pupil for supplies and services | $ Allocation per pupil |
|---|---|---|---|---|---|
| Classroom Teacher<br>Class size: 22:1 | Class Tchr.<br>Supply Tchr.<br>Staff development<br>Teacher Adviser | 40.90<br>0.00<br>0.00<br>1.05 | 50,975 + 12%<br><br><br>50,975 + 12% | <br>61<br>12<br> | 2,468 |
| Teacher Assistants | | 0 | | | 0 |
| Textbooks and Learning Materials | | | | 100 | 100 |
| Classroom Supplies | | | | 173 | 173 |
| Classroom Computers | | | | 56 | 56 |
| Library and Guidance Services | Tchr. Librarian<br>Guidance Tchr. | 1.1<br>2.6 | 50,975 + 12% | | 211 |
| Professional/Para-Professional Supports | | 2.1 | 43,686 + 14.8% | | 105 |
| Prep Time | | 8.39 | 50,975 + 12% | | 479 |
| In-School Administration | Principal<br>VP<br>Dept. head allowances<br>Secretary | 1.1<br>1.5<br>9.0<br>5.33 | 86,479 + 12%<br>76,337 +12%<br>3,262 + 12%<br>29,859 + 18% | <br><br><br>5 | 460 |
| Classroom Consultants | | 0.54 | 70,171 + 12% | | 42 |
| **TOTAL FOUNDATION GRANT** | | **64.61 (excl. department heads)** | | **407** | **4,094** |

**Calculations concerning classroom teachers and preparation time**

The Foundation Grant provides funding for secondary classroom teachers that is based on the legislated teaching time and class size standards. The grant is based on:

- the legislated standard that, at a secondary school level, teachers are teaching, on average, 1250 minutes out of 1500 minutes (1500 minutes is equivalent to a 5 day instructional cycle);
- the provincial standard for average class sizes (22:1), and
- an average per-pupil credit load of 7.2 credits per student.

The grant provides enough funding to pay for a teacher for each student, including additional funding for other teacher(s) to cover preparation time, using a benchmark amount for salary and benefits.

In 2000-01, funding available for secondary classroom teachers has been changed to reflect the inclusion of teacher adviser duties in instruction time. The Foundation Grant and special purpose grants that include funding for secondary classroom teachers have been increased to support teacher adviser duties.

The funding benchmarks continue to reflect the overall legislated minimum teaching time requirement of an average of 1250 minutes for each period of five instructional days. The new funding for teacher adviser time is equivalent to approximately 30 minutes over a 5 day instructional period.

It should be noted that other special purpose grants (such as the Special Education Grant and Language Grant) also provide funding for classroom teachers, based on the same benchmarks. The Teacher Compensation Grant adjusts funding to how each board's teachers' qualifications and experience increase its costs above the benchmark salary and benefit amounts in the Foundation Grant. Where the average credit load of a board's secondary school pupils in the 1999-00 school year exceeds the base level of 7.2 credits per pupil, the board receives assistance under the Teacher Compensation Grant (see section 6 of this document).

## DESCRIPTION OF COMPONENTS

**Classroom Teacher:** salaries and benefits (which include the normal cost of retirement gratuities) for classroom teachers (including teacher adviser duties at the secondary level), supply and occasional teachers to cover absences, and professional development for teachers.

**Teacher Assistants:** teaching assistants who support teachers in the classroom, primarily in JK and SK.

**Textbooks and Learning Materials:** includes textbooks, workbooks, resource materials, updating library materials, instructional software, CD ROMs, Internet expenses and technology supporting distance education.

**Classroom supplies:** other classroom supplies including paper, pens and pencils and other materials; classroom equipment.

**Classroom Computers:** includes classroom computers (hardware only) and the associated network costs.

**Library and Guidance Services:** includes teacher librarians and guidance teachers. Guidance teachers at the elementary level are those providing guidance primarily to grades 7 and 8 pupils.

**Professional and Paraprofessional Services:** staff who provide support services to students and teachers, and includes, for example, attendance counsellors, social workers, child/youth workers, community workers, and computer technicians. Professionals and paraprofessionals providing support for special education, such as psychologists, psychometrists, speech pathologists, are funded through a combination of the Foundation Grant and the Special Education Grant.

**Preparation Time:** funding for the extra teachers' salaries and benefits costs required to allow teachers non-class time for lesson preparation, marking and consulting other professionals and parents.

**In-School Administration:** includes principals, vice principals, department heads at the secondary level, school clerical staff, and supplies for school administration purposes, including for school councils.

**Classroom Consultants:** teacher consultants and coordinators (for example, reading specialists, program specialists who assist teachers in developing curriculum or with individual students).

## SPECIAL PURPOSE ALLOCATIONS

The special purpose allocations maintain funding for special needs students as well as recognizing differences in student needs, language proficiency, geography, transportation needs, and other variations in local circumstances. The funding model provides for a projected $3,880M for the following nine special purpose allocations:

| ALLOCATION | STUDENT-FOCUSED FUNDING * ($ Millions) |
|---|---|
| Special Education | 1,280 |
| Language | 399 |
| Geographic and School Authorities | 156 |
| Learning Opportunities | 214 |
| Adult, Continuing Education and summer school | 143 |
| Teacher Compensation | 635 |
| Early Learning | 33 |
| Transportation | 578 |
| School Board Administration and Governance | 442 |

* These amounts are ministry projections for the 2000-01 school year. Actual funding may vary based on board enrolment and board program decisions.

# 1. SPECIAL EDUCATION

The Special Education Grant provides funding for exceptional pupils and other students with special needs. This funding is intended to support the additional programs, services and equipment required to meet the educational needs of these students.

The funding for 2000-01 includes two components:

Special Education Per Pupil Amount (SEPPA)
Intensive Support Amount (ISA)

For 2000-01, a projected total amount of $ 1,280M will be available for the special education allocation distributed as follows:

| | |
|---|---|
| SEPPA | $653M |
| ISA 1 | $5M |
| ISA 2 and 3 | $558M |
| ISA 4 | $64M |
| Total | $1,280M |

The amount for ISA 2 and 3 includes an allocation of $2.5M for the special incidence portion (SIP).

**SEPPA**

The SEPPA portion will be allocated to boards on the basis of total enrolment. It recognizes the costs of providing additional assistance to the majority of students with special needs. For 2000-01 the per-pupil amount is:

$ 376 per elementary student
$ 243 per secondary student

The per-pupil amount increases over 1999-2000 reflect the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level.

**ISA**

Boards will claim ISA funding based on the enrolment of individual students who meet the criteria for ISA funding. These criteria are outlined in the *2000-01 Resource Manual for*

*the Special Education Grant, Intensive Support Amount (ISA)*, as are the detailed guidelines and instructions for making a claim.

Claims will be reviewed by the ministry for validation purposes. Funding for ISA 2 and 3 will be the greater of the result of the 2000-01 claim process and the 1999-00 ISA allocation (net of portability). Portability adjustments as outlined in the *2000-01 Manual for the Special Education Grant, Intensive Support Amount (ISA)* will be applied to the above in the determination of the final ISA allocations for the board for 2000-01.

ISA funding is structured in 4 levels:

ISA 1 This level covers the incremental cost of an individual student's equipment needs in excess of $800 in the year of purchase. Boards will be expected to use their SEPPA allocation to cover the first $800. For example, a board with a student requiring an adapted computer that costs $3,000 could receive $2,200 in ISA funding, if approved.

ISA 1 claims in excess of $6,000 per student will require District Office approval.

ISA 2 and 3 These levels cover the cost of providing the intensive staff supports required by the small number of pupils with very high needs. For 2000-01, the funding will not be lower than the ISA funding received by the boards in 1999-00 (net of portability).

A Special Incidence Portion may also be approved by the Minister in respect of ISA pupils with exceptionally high needs. Eligibility criteria for this funding are outlined in the Resource Manual; claims will require individual District Office approval.

Boards will be required to provide information on their ISA level 2 and 3 pupils in accordance with the new criteria outlined in the guideline, *2000-01 Resource Manual for the Special Education Grant, Intensive Support Amount (ISA)*.

ISA 4 This level is intended to provide funding for programs supported through Section 19 grants for pupils who are receiving their education in a facility such as a hospital, a correctional facility, or a care and treatment facility. The total level of support and the application process remain unchanged.

Funding will be portable. Equipment will normally travel with the student if the student transfers to another board. An in-year adjustment will be made if ISA-eligible students move from one board to another.

## 2. LANGUAGE

The Language Allocation includes 5 components:

French as a First Language;
French as a Second Language;
Native Language;
Language Instruction -- ESL/ESD;
Language Instruction -- ALF/PDF.

Amounts under all components of the Language Allocation have been increased over 1999-00 to reflect the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level.

### FRENCH AS A FIRST LANGUAGE

This funding is applicable to French language boards only and recognizes the higher instructional, material and administrative costs incurred in providing French-language programs. The funding for 2000-01 has been increased over last year to help French boards meet the challenges of educating their students in predominantly English-speaking communities.

$391 will be provided per elementary pupil and $631 per secondary day school ADE, excluding pupils aged 21 and over .

Start-up funding for new elementary classes in French will be provided at the rate of $10,800 for each new elementary school established by the board in 2000-01.

### FRENCH AS A SECOND LANGUAGE

This funding provides for the additional costs of providing core French, extended French and French immersion programs. It is based on the number of pupils enrolled in these programs and varies with the average daily length of the program.

At the elementary level, funding will be provided for core and extended French for grades 4 to 8. French immersion programs will be funded for grades JK - 8 if they are offered by the board.

In planning for the provision of French language programs, school boards are required to ensure that the requirement under current ministry policy that each elementary student has accumulated at least 600 hours of French language instruction by the end of grade 8 is met.

Funding for French immersion programs and extended French programs will also be provided on the same basis as in 1999-00.

The following table gives the per pupil amount provided for French as a Second language. The amounts are increased over 1999-2000 to reflect the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level.

FSL - Elementary:

| Average daily length of program | Allocation per pupil enrolled in the program |
|---|---|
| 20 - 59 minutes | $232 |
| 60 - 149 minutes | $264 |
| 150 minutes or more (Grades 1 to 8)<br>75 minutes or more (JK/K) | $295 |

FSL - Secondary:

The funding is established according to credits as follows :

| Grades | Allocation per pupil credit – subject of French | Allocation per pupil credit – subjects other than French taught in French |
|---|---|---|
| 9 and 10 | $59 | $97 |
| 11, 12 and OAC | $78 | $150 |

*Data source: Elementary September School Reports - pupils enrolled as of October 31, 2000, Table H. Secondary September School Reports- pupil credits as of October 31, 2000, Table L. Secondary March Reports- pupil credits as of March 31, 2000, Table L.*

## NATIVE LANGUAGE - ABORIGINAL LANGUAGES

This funding assists school boards that wish to provide Native language programs. It is based on the number of pupils enrolled in the program and the average daily length of the program, as set out in the following tables.

The amounts are increased over 1999-2000 to reflect the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level.

NL - Elementary:

| Average daily length of program | Allocation per pupil enrolled in the program |
|---|---|
| 20 - 39 minutes | $222 |
| 40 minutes or more | $395 |

NL - Secondary:

The funding is established according to credits as follows:

| Level/Grades | Allocation per pupil credit |
|---|---|
| 9 and 10 | $59 |
| 11, 12 and OAC | $78 |

*Data source: Elementary September School Reports - pupils enrolled as of October 31, 2000, Table Q. Secondary September School Reports- pupil credits as of October 31, 2000, Tables M and R. Secondary March Reports- pupil credits as of March 31, 2000, Tables M and R.*

## LANGUAGE INSTRUCTION (ESL/ESD; ALF/PDF)

This funding is applicable to school boards that provide language instruction in regular day school programs for pupils in English-language schools whose first language is not English and for pupils in French-language schools who are entitled to French-language education or are admitted through an admission committee and have limited competencies in French.

These programs provide pupils with an opportunity to participate in regular instruction classes as soon as possible.

Funding amounts are set out in the following formulas. The amounts are increased over 1999-2000 to reflect the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level. Per-pupil amounts for ESL and PDF have also been further increased to provide more funding to school boards for these programs.

### English as a second language/English Skills Development (ESL/ESD)

The funding is applicable to English language boards and is based on two components as follows:

1) This first component will provide a total of $5,077 per eligible student over three years and is based on the number of immigrant pupils from countries where English is not a first or standard language.

The formula will take into account 3 years of data. The number of eligible pupils under this criteria will be weighted using the following factors:

- 1.0 for pupils who entered Canada during the last year, including September and October 2000 (September 1, 1999 to October 31, 2000)

- 0.6 for pupils who entered Canada during the previous year (September 1, 1998 to August 31, 1999)

- 0.3 for pupils who entered Canada during the two years prior (September 1, 1997 to August 31, 1998)

*Data source : September School Report - Principals are required to report under section K of the Elementary September School Report and Section I of the Secondary September School Report the number of pupils enrolled in the schools, who entered Canada during the last three years from a country where English is not a first or standard language. Schools are required to keep appropriate immigration information in the pupils' OSR (Ontario Student Record) to support the number of pupils reported as having entered Canada during the last three years.*

2) The second component of the funding is an allocation calculated by the ministry based on Statistics Canada data on the number of children aged 5 to 19 years where the language spoken most often at home is neither English nor French. This is deemed to be a proxy for the relative ESL/ESD need amongst boards for pupils not covered by the first component. Each board's allocation set out in Table 1 of the 2000-01 grant regulation. The distribution among boards is calculated as follows:

$$\frac{\text{Number of children described above within board's area}}{\text{Total of children described above}} \times \$21\text{M}$$

The distribution of children aged 5 to 19 between public and separate boards is based on the number of pupils residing within each enumeration area and on assessment data.

*Data source: Statistics Canada, 1996 census - information on the 5 to 19 years population group where the language spoken most often at home is neither English nor French.*

**ESL/ESD grant** = Total number of weighted pupils (under 1 above) x $2,672
+
allocation for pupils in Canada (under 2 above)

**French Language Instruction (ALF/PDF)**

There are two components to the ALF/PDF funding.

1) Actualisation Linguistique en Français (ALF)

This component of the funding is designed to assist French-language school boards in providing language instruction to pupils who are entitled to French-language education by virtue of section 23 of the *Canadian Charter of Rights and Freedoms* and who have limited or no competencies in French or have a variety of language which is different from standard French.

The ALF funding component under the new funding model for language instruction will be based on the following 3 factors and will be calculated separately for each geographic area within the French language public (or separate) board that is coterminous with the English language public (or separate) board :

i) Basic Level of Service

Elementary: 1 instructional unit/200 pupils for the first 200 pupils
Elementary: 1 instructional unit/400 pupils for the next 1,600 pupils
Elementary: 1 instructional unit/750 pupils for the remainder of pupils

Secondary: 1 instructional unit/400 pupils for the first 1,200 pupils
Secondary: 1 instructional unit/750 for remainder of pupils

ii) Assimilation factor

The assimilation factor is based on the percentage of students in French Language instructional units over total students (English and French) within the coterminous geographic areas within the French language district school board (as referred to above).

1.5 for 0-10 %
1.0 for 10-100 %

iii) Cost per Instructional Unit

The cost per instructional unit for 2000-01 is determined on a combined panel basis (elementary and secondary).

Elementary $61,664
Secondary $61,664

The total ALF allocation for the French-language DSB will be the sum of the ALF funding components calculated for each geographic area within the French-language board that is coterminous with an English-language public (or separate) board:

| ALF funding component (For each geographic area) | = | Number of instructional instructional units for basic level of service | x | assimilation factor | x | Cost per Instructional Unit |
|---|---|---|---|---|---|---|

2) Perfectionnement du Français (PDF)

The second component is for PDF programs and will be based on the number of immigrant pupils who entered Canada during the last three years from countries where French is a language of administration or schooling and who do not have Charter 23 rights. The PDF program is intended for pupils who have been admitted in the schools through the board's admissions committee. These pupils are generally born outside Canada and have one of the following characteristics:

i) They speak a variety of language which is different from standard French,
ii) Their schooling has been interrupted, or
iii) They have little knowledge of Canada's two official languages and/or need to familiarize themselves with the new environment.

The PDF funding component is based on the number of immigrant pupils who entered Canada during the last three years from countries where French is a language of administration or schooling and who have one of the three characteristics identified above.

The formula will take into account 3 years of data. The number of eligible pupils under this criteria are weighted using the following factors:

- 1.0 for pupils who entered Canada during the last year, including September and October 2000 (September 1, 1999 to October 31, 2000)

- 0.6 for pupils who entered Canada during the previous school year (September 1, 1998 to August 31, 1999)

- 0.3 for pupils who entered Canada during the two school years prior (September 1, 1997 to August 31, 1998)

PDF grant component = Total number of weighted pupils x $2,672

*Data source : September School Report - Principals are required to report under section K of the elementary September School Report, and section I of the secondary September School Report, the number of pupils enrolled in the schools, who entered Canada during the last three years from a country where French is a language of administration and schooling and who have a variety of language different from standard French, whose schooling has been interrupted or who need to familiarize themselves with the new environment. Schools are required to keep appropriate immigration information in the pupils' OSR (Ontario Student Record) to support the number of pupils reported as having entered Canada during the last three years.*

## 3. GEOGRAPHIC & SCHOOL AUTHORITIES GRANTS

These allocations include a recognition of the additional costs of operating small schools in isolated areas, and in rural areas with sparse pupil population.

The components of the Geographic & School Authorities allocation are as follows:

Small Schools (including a new allocation for principals)

Remote and Rural Boards

Funding Provisions for School Authorities (Includes Isolate Boards and Boards on Tax-Exempt Land)

Funding amounts for the Small Schools and Remote and Rural components have been increased over 1999-2000 to reflect the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level.

### SMALL SCHOOLS

To offset the higher per pupil cost of programs in small schools, additional financial assistance in the form of a Small Schools allocation is provided. Under the new governance model, there is no "mixed school" funding. However, small English and French language instructional units may continue to share facilities. The additional costs associated with the small size of the cooperating schools will be recognized under the Small Schools allocation.

Small schools generally exist in areas of sparse population.

Small elementary schools are defined as having fewer than an average of 20 pupils per grade, located eight or more kilometres from other elementary schools of the board.

Small secondary schools are defined as having fewer than an average of 120 pupils per grade, located 32 or more kilometres from other secondary schools of the board.

### Detailed calculation of small school allocation - Elementary

Sum for all schools of:

| Small School Allocation | = | School factor | x | Remoteness factor | x | School enrolment | x | $6,088 |
|---|---|---|---|---|---|---|---|---|

**Remoteness Factor** = 1.50 for schools or portions of a twinned or annexed school located more than 80 kilometres from all other elementary schools or portions thereof under the jurisdiction of the board, and

= 1.25 for schools or portions of a twinned or annexed school located more than 32 kilometres and fewer than 80 kilometres from all other elementary schools or portions thereof under the jurisdiction of the board, and

= 1.0 for all other schools.

In determining the distance for a French-language public (or separate) school, only those French-language public (or separate) schools located within the jurisdictional boundary of a coterminous English-language public (or separate) board are to be considered, and this determination is to be done separately for each of the English-language public (or separate) board jurisdictions with which the French-language public (or separate) board is coterminous.

**School Factor** = 1.0 for schools with fewer than 2 pupils per grade,

= a sliding scale between 1.0 and 0.2 for schools with between 2 and 10 pupils per grade,

$$0.2 \times \left( \frac{10}{\text{Pupils per grade of School A}} \right)$$

= a sliding scale between 0.2 and 0 for schools with between 10 and 20 pupils per grade,

$$0.2 \times \left( 1 - \frac{\text{Pupils per grade of school A} - 10}{10} \right)$$

Where Pupils per Grade for School A = $\frac{\text{Enrolment of School A}}{\text{Number of grades of School A}}$

In the case where there are two or more schools within 8 kilometres of each other (within the same board), the calculation of the adjusted pupils per grade is done by combining the enrolment of the schools and calculating the pupils per grade as though these schools were one school.

**Enrolment** means the full-time equivalent day school enrolment at October 31, 2000. Junior Kindergarten and Kindergarten are counted as 0.5 FTE. In the case of combined programs, JK and K enrolment is counted as 0.4 FTE and 0.6 FTE.

For purposes of calculating the number of grades, Junior Kindergarten and Kindergarten are counted as 0.5 grades each. Special education or "ungraded" is not counted as a grade. Only grades with actual pupil enrolment are to be counted for the purpose of determining pupils per grade.
*Data Source: 2000 September School Report*

## Detailed calculation of small school allocation - Secondary

Sum for all schools of:

$$\text{Small School Grant} = \text{School Factor} \times \text{Remoteness Factor} \times \text{School Enrolment} \times \$7{,}413$$

**School Factor** =

= 0.45 for schools with fewer than 20 pupils per grade,

= for schools with between 20 and 60 pupils per grade,

$$0.15 \times \left( \frac{60}{\text{Pupils per grade of School A}} \right)$$

= For schools with between 60 and 120 pupils per grade,

$$0.15 \times \left( 1 - \frac{\text{Pupils per grade of School A} - 60}{60} \right)$$

$$\text{Where Pupils per Grade for School A} = \frac{\text{Enrolment of School A}}{\text{Number of grades of School A}}$$

**Remoteness Factor** = in the case where School A is located more than 80 kilometres from all other secondary schools under the jurisdiction of the board, the school factor of School A is increased by the factor defined below:

For schools with fewer than 20 pupils per grade, remoteness factor = 2.0

For schools with between 20 and 120 pupils per grade:

$$\text{Remoteness Factor} = 1 + \left( \frac{40}{\text{Pupils per grade of School A} + 20} \right)$$

In determining the distance for a French-language public (or separate) school, only those French-language public (or separate) schools located within the jurisdictional boundary of a coterminous English-language public (or separate) board are to be considered, and this determination is to be done separately for each of the English-language public (or separate) board jurisdictions with which the French-language public (or separate) board is coterminous.

**Enrolment** means the full-time equivalent day school enrolment of at October 31, 2000, excluding pupils 21 and over.

**Pupils per Grade** For the purposes of calculating the number of secondary school grades,

| | |
|---|---|
| If Junior High with grades 7 - 9 | 1 grade |
| If Secondary School with grades 9-OAC | 5 grades |
| If Secondary School with no OAC | 4 grades |

Pre-grade 9 is not counted as a grade.
Only grades with actual pupil enrolment are to be counted for the purpose of determining pupils per grade.

*Data Source: 2000 September School Reports*

## Principals component of small schools allocation

This allocation provides enhanced funding for principals to boards with a high proportion of small schools. Boards that receive this new funding will have the flexibility to use it to provide more principals or to increase the time that part-time principals can spend in their principal duties.

The funding formula provides for an additional allocation for principals where the average ratio of principals to schools at the elementary and secondary level is below a minimum threshold.

The definition of "school" used in this component is a school that has been identified as an elementary or secondary school in the ministry's School Facilities Inventory database where pupils are enrolled in a day program in 2000-01.

Principal allocation at the elementary level

$$\left(0.69 - \frac{\text{Elem. ADE} \times \$244}{\$79{,}296 \times 1.12 \times \#\text{ of elem. schools}}\right) \times \$79{,}296 \times 1.12 \times \#\text{ of elem. schools}$$

Principal allocation at the secondary level

$$\left(0.40 - \frac{\text{Sec. ADE} \times \$107}{\$86{,}479 \times 1.12 \times \#\text{ of Sec. schools}}\right) \times \$86{,}479 \times 1.12 \times \#\text{ of Sec. schools}$$

Explanatory note: in these calculations:

$244 and $107 represent the per-pupil funding for principals in the Foundation allocation at the elementary and secondary levels respectively.

$79,296 and $86,479 are the salary benchmarks for principals in the Foundation allocation at the elementary and secondary levels respectively.

1.12 is the recognized employee benefit level (12%) for principals included in the Foundation allocation per pupil.

**Remote and Rural Boards**

The intention of this funding is to reflect the higher cost of purchasing goods and obtaining services for boards that are remote from major urban centres, and whose schools are distant from each other.

Three factors are considered in determining the funding:

**1) Distance**

Distance is measured from the nearest defined cities of Toronto, Ottawa, Hamilton, London, or Windsor (referred to as D in the formula below) to the town or city located nearest to the geographic centre of the board. This takes into account the additional costs of goods and services relating to remoteness.

| Distance | Per Pupil allocation |
|---|---|
| 0 - 150km | 0 |
| 150 - 650km | $0.974 x (D-150) |
| 650 -1150km | $487 + $0.135 x (D-650) |
| 1150 + km | $555 |

**2) Pupil sparsity**

Sparsity of the pupil population in the board's jurisdiction (referred to as pupil density in the formulae below - pupils per square kilometre). This covers the cost of moving goods and services within a board.

| Pupil density (PD) | Per Pupil allocation |
|---|---|
| 0 - 1.0 | $405 x (1 - PD ) |
| Greater than 1.0 | $0 |

### 3) Urban factor

Costs of goods and services associated with accessibility, based on the existence or absence within a board's jurisdiction of a city or town with a population greater than 25,000.

| City or town within a board's jurisdiction with a population of | Urban factor |
|---|---|
| 0 - 25,000 | 1 |
| 25,000 - 200,000 | $1 - (\frac{\text{Population} - 25{,}000}{175{,}000})$ |
| 200,000 + | 0 |

Calculation of per pupil allocation = ( Per pupil allocation based on distance x Urban Factor ) + Per pupil grant based on pupil sparsity

The ministry will review the existing parameters that are used for this funding and evaluate refinements for 2001-02 funding.

**School Authorities Funding**

Isolate School Authorities

The costs per pupil for very small school boards, usually located in remote areas of Ontario, referred to as isolate school authorities, are generally very high.

The funding of the net expenditures of isolate school authorities is based on District Office approvals, in accordance with an approvals guideline. The approvals guideline is developed using an allocation formula which has been modified to address the basic costs of operating very small schools in remote areas. The allocation formula is based on the new funding model to the extent possible, with provisions for special approval by District Offices to minimize funding impacts.

For 2000-01, funding for isolate school authorities will be maintained at the 1999-00 level of net expenditure of these boards, with recognition for the increase in salary and benefits benchmarks, subject to approval.

## School Authorities on Tax-Exempt Land

This grant provides for the costs of operating schools located on tax-exempt land. These include schools in sanatoriums, hospitals, and children's treatment centres.

For 2000-01, funding for school authorities on tax exempt land will be maintained at the 1999-00 level of net expenditure of these boards, with recognition for the increase in salary and benefits benchmarks, subject to approval.

## 4. LEARNING OPPORTUNITIES ALLOCATION

The learning opportunities allocation for 2000-01 consists of two components:

Demographic component
Literacy and numeracy component

### 1) Demographic component

This component of the Learning Opportunities Allocation provides funding to school boards based on social and economic indicators which have been associated with a higher risk of academic difficulties for students. This grant will permit boards to offer a wide range of locally determined programs to improve the educational achievement of these students.

The 2000-01 allocation continues each board's allocation in 1999-2000, adjusted by the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level.

The allocation is determined by the following socio-economic indicators:

| Indicator | Description | Provincial Rate |
|---|---|---|
| Low Income Cut-Off (LICO) | The percent of all persons who are living below the Low Income Cutoff Point. LICOS are determined by Statistics Canada, and vary from one community to another. | 13.1% |
| Low Education | The percent of all persons 15 years or over who have less than a grade 9 level education. | 11.5% |
| Recent Immigrants | The percent of all persons who were recent immigrants (immigrated to Canada between 1988 and 1991). | 3.25% |
| Aboriginal Status | The percent of all persons indicating "Aboriginal" as their sole ethnic origin | 0.7% |

The funding is based on:

1) the eligible enumeration areas within the board;
2) funding units within eligible enumeration areas; and
3) allocation of funding units among each board within the eligible areas.

Eligible area:

The area used for the purpose of the calculation is an enumeration area.

An area is eligible where the percentage of the area population in any one of the four socio-economic indicators is at least twice the provincial rate. Once an enumeration area is eligible on any one of the four indicators, its funding is calculated based on the LICO rate for that enumeration area.

Funding Units:

$$\text{Funding units} = \text{Child population (less than 18 years of age)} \times \left( \frac{\text{\% area population (LICO)}}{\text{provincial LICO rate}} \right)$$

In some instances LICO information may not be available for an eligible enumeration area due to the suppression of low response rates by Statistics Canada. (The suppression rates are often higher on variables dealing with income, due to respondent sensitivity in this area). Where no LICO information is available for the eligible enumeration area, the Low Education variable is used in place of LICO for the calculation of funding units.

*Example:*

Data for enumeration area A:

| | |
|---|---|
| Child population(under 18 year old): | 1,300 |
| % of population below the low income cut-off point: | 11.1% |
| % of population with aboriginal status | 0.1% |
| % of population 15 years and older with lower than grade 9 education | 24.0% |
| % of population who were recent immigrants | 5.0% |

In this example, the enumeration area qualifies since it is more than twice the provincial rate on the low education variable.

Funding units for eligible area A:

$$1{,}300 \times \left( \frac{\text{11.1 (LICO rate of area A)}}{\text{13.1 (provincial LICO rate)}} \right)$$

All funding units in eligible enumeration areas are summed according to census subdivisions (CSD). Funding units in a CSD is apportioned to each board by using municipal enumeration data showing school aged population of public and separate and English and French electors.

The funding units that a board has accumulated are then translated into grant dollars as follows:

$$\left( \frac{\text{Total number of funding units for a board}}{\text{Total number of funding units for all boards}} \right) \times \text{Total grant allocation}$$

Each board's allocation for this component is set out in table 4 of the grants regulation.

## 2) Literacy and numeracy component

In 2000-01, funding is added to allow boards to provide additional supports to enhance the literacy and numeracy skills of students at risk of not meeting the new curriculum standards and the requirements of the Grade 10 literacy test.

These courses or programs can be provided during the summer, and during the regular school year outside the regular school day. Funding is provided at the continuing education rate of $2,294 per ADE for:

> A class or course in literacy and numeracy for pupils in grade 7 or 8 for whom a remedial program in literacy and numeracy has been recommended by the principal of the day school.
>
> A non-credit class in literacy and numeracy for pupils in grade 9 or 10 for whom a remedial program in literacy and numeracy has been recommended by the principal of the day school.
>
> A class or course in literacy and numeracy established for adults who are parents or guardians of pupils in all grades for whom the principal of the day school has recommended a remedial course in literacy and numeracy.

This funding provision will be subject to phase-in adjustments in 2000-01.

Transportation for pupils enrolled in summer school literacy and numeracy programs will be provided as follows:

$$\frac{\text{2000-01 transportation allocation for the board}}{\text{2000-01 ADE of pupils of the board}} \times \text{ADE of grades 7 to 10 literacy and numeracy summer school programs} \times 3$$

Grants for school operations and school renewal will be provided for students in grades 7 to 10 literacy and numeracy summer school programs under the Pupil Accommodation allocation.

*Summer, 2000*:

Funding for these expanded literacy and numeracy programs will also be available in the summer of 2000, for at-risk students in Grades 7 to 10 and for parents of at-risk students. The ADE and grants regulations for the 1999-2000 school year have been amended to provide funding for these programs. Transportation for students to summer programs in 2000 will also be provided at an increased level of funding.

Literacy and numeracy programs for students in grades 7 to 10 provided in the summer of 2000 will be funded outside of the phase-in provisions.

## 5. ADULT, CONTINUING EDUCATION & SUMMER SCHOOL

This funding supports the provision of adult day school programs and continuing education programs such as adult English or French as a second language, adult Native language, adult credit for diploma and correspondence/self-study and international language programs for elementary pupils.

Amounts in this allocation have been adjusted to reflect the 1.95% increase to salary and benefit benchmarks.

In 2000-01, funding will be provided for crossover or transfer courses to allow students to move between the applied and academic streams in secondary school, and to allow partial credits as permitted by secondary school reform. The allocation will provide funding for a class or course for secondary school pupils who wish to transfer between course types in accordance with section 5.6 of the ministry publication *Ontario Secondary School Grades 9-12 - Program and Diploma Requirements - 1999*.

Funding for continuing education and summer school programs is increased to $2,294 per ADE (excluding pupils in respect of whom fees are chargeable under the tuition fees regulation).

Funding for day school pupils aged 21 and over is increased to $2,294 per average daily enrolment. Grants for school operations and school renewal will be provided for these students, as well as for students enrolled in summer school programs and in continuing education credit courses offered during the day (under the Pupil Accommodation allocation).

The allocation for international languages that was provided to school boards offering approved classes for heritage language instruction in a language other than English or French will be maintained at $41 per classroom hour where the board's average class size for the program is 25 or more. The funding is based on a dollar amount per hour of classroom instruction. Where the average class size for a board is less than 25, the $41 grant per classroom hour is reduced by $1 for every pupil less than 25 .

## 6. TEACHER COMPENSATION ALLOCATION

The teacher compensation allocation will provide resources to help meet teacher compensation costs and to recognize the varying salary costs created by the normal range in teachers' qualifications and experience.

Amounts in this allocation have been adjusted to reflect the 1.95% increase to salary and benefit benchmarks and the inclusion of teacher adviser duties at the secondary level.

**Teacher Qualifications and Experience Component**

The Q and E component will provide funding to boards that have teachers who, because of their qualifications and experience, have salaries above the level used in the determination of the Foundation Allocation. The elementary per pupil allocation is calculated as follows:

$$\left( \frac{\text{Sum of} \left( \begin{array}{l}\text{Elementary teachers} \\ \text{on board's regular grid}\end{array} \times \begin{array}{l}\text{Instructional} \\ \text{Salary matrix}\end{array} \right)}{\begin{array}{l}\text{Number of elementary teachers on} \\ \text{boards' regular grid distribution}\end{array}} - 1 \right) \times \$2{,}597$$

The secondary per pupil allocation is calculated as follows:

$$\left( \frac{\text{Sum of} \left( \begin{array}{l}\text{Secondary teachers} \\ \text{on board's regular grid}\end{array} \times \begin{array}{l}\text{Instructional} \\ \text{Salary matrix}\end{array} \right)}{\begin{array}{l}\text{Number of secondary teachers on} \\ \text{boards' regular grid distribution}\end{array}} - 1 \right) \times \$3{,}085$$

## INSTRUCTIONAL SALARY MATRIX

| Qualification & experience | D | C | B | A1 | A2 | A3 | A4 |
|---|---|---|---|---|---|---|---|
| 0 | 0.579 | 0.5788 | 0.5788 | 0.6229 | 0.6487 | 0.7081 | 0.7449 |
| 1 | 0.613 | 0.6127 | 0.6127 | 0.654 | 0.6864 | 0.7502 | 0.7926 |
| 2 | 0.633 | 0.6332 | 0.6332 | 0.6989 | 0.7318 | 0.7969 | 0.8432 |
| 3 | 0.652 | 0.6523 | 0.6523 | 0.7416 | 0.7743 | 0.8442 | 0.8925 |
| 4 | 0.715 | 0.7149 | 0.7149 | 0.7814 | 0.8158 | 0.8953 | 0.9443 |
| 5 | 0.77 | 0.7698 | 0.7698 | 0.8234 | 0.8606 | 0.9435 | 0.9975 |
| 6 | 0.823 | 0.8225 | 0.8225 | 0.8655 | 0.9042 | 0.9866 | 1.0473 |
| 7 | 0.869 | 0.8694 | 0.8694 | 0.9073 | 0.9472 | 1.0363 | 1.0997 |
| 8 | 0.89 | 0.89 | 0.89 | 0.9485 | 0.9876 | 1.086 | 1.1512 |
| 9 | 0.915 | 0.9154 | 0.9154 | 1.0025 | 1.0411 | 1.1534 | 1.2026 |
| 10 | 0.967 | 0.9667 | 0.9667 | 1.0451 | 1.0989 | 1.2136 | 1.2949 |

*Data Source: Data Form A, January 31, 1998 & Form A, January 31, 1998, Information as previously provided to the Education Relations Commission.*

The salary matrix reflects a benchmark of $50,975 for teacher salary and excludes teacher consultants and the administrative component of principals and vice-principals. They are therefore to be excluded from the board's regular grid distribution for the purpose of calculating the Q & E component of the funding.

The teacher distribution reported as of October 31, 2000 is to be used for the calculation of the Q&E grant for 2000-01. Where the qualification of a teacher is changed after October 31, 2000 and the change for salary purposes is retroactive to October 2000 or earlier, the changed qualification category shall be used for the purpose of this calculation.

For the purpose of the determination of the Teacher Qualification and Experience amount for the board, the number of full years of experience, where a teacher has part year's experience, shall be rounded down to the nearest whole number.

**Special assistance for average per pupil credit load**

This component of the Teacher Compensation allocation provides funding at the secondary level where the average credit load of secondary school pupils exceeds 7.2 credits per pupil. Assistance is provided to recognize an average credit load of up to a maximum of 7.5 credits per pupil.

The component is calculated as follows:

| | | | | |
|---|---|---|---|---|
| {Average number of Secondary School Credits per pupil for the board in the 1999-2000 school year (up to a maximum of 7.5) -7.2}/ 7.2 | x | $2,874 for classroom teachers and preparation time | x | 2000-2001 Secondary day school ADE (excluding pupils aged 21 and over) |

For the purpose of calculating the average number of secondary school credits per pupil, a special education secondary school pupil enrolled on a full-time basis in programs for which a credit is not granted will be granted an equivalent of 8 credits.

## 7. EARLY LEARNING ALLOCATION

This funding provides all school boards with an equitable level of resources to support early learners - pupils up to Grade 3.

Amounts in this allocation have been adjusted to reflect the 1.95% increase to salary and benefit benchmarks.

Pupils enrolled in JK are funded on the same basis as other pupils, through the Foundation allocation, special purpose allocations, and Pupil Accommodation allocation. JK pupils are funded as 0.5 FTE.

Boards that do not offer Junior Kindergarten will receive an Early Learning Allocation of $619 per pupil based on their Senior Kindergarten to Grade 3 enrolment. The Early Learning Allocation has been set at a level that is equivalent on average to the funding a board would receive if it were to offer JK.

Boards that offer JK will not normally be eligible for the Early Learning allocation. However, in some instances, boards that provide JK in part of their jurisdiction may claim the Early Learning allocation for the remaining part of their jurisdiction. To recognize and support a board's option to use the funding available to support early learning in a manner which best meets local needs, the following formula is provided:

The Early Learning allocation =

| | | | | | | |
|---|---|---|---|---|---|---|
| $619 | x | Board's ADE (SK to grade 3) | – | JK ADE | x | Board's 2000-01 allocation per elementary pupil |

The board's 2000-01 allocation per elementary pupil includes:

- allocations for Foundation Grant;
- special purpose allocations, excluding the Early Learning allocation and Adult, Continuing Education and Summer School allocation, the literacy and numeracy component of the Learning Opportunities allocation, and the French as a second language allocation for the core and extended programs; and
- Pupil Accommodation allocations, excluding the allocations for debt servicing, school renewal and new pupil places.

For the purpose of the calculation of this allocation, JK and K pupils enrolled in combined programs will be deemed to be half-time pupils.

## 8. TRANSPORTATION ALLOCATION

The Transportation allocation provides financial assistance to school boards to recognize costs of transporting pupils from home to school or from school to school, including transportation of special needs students.

The ministry is in the process of developing a formula that uses technology as a key component in the calculation of future student transportation grants, with the assistance of the Transportation Review Committee, which was established in 1998 to review the funding of student transportation.

The ministry is encouraging school boards to make their transportation services more efficient by providing transportation services in cooperation with other boards and implementing other efficient practices recommended by the Transportation Review Committee.

Funding for transportation for 2000-01 for a district school board will include the following two components:

**Allocation excluding provincial schools transportation**

| | | |
|---|---|---|
| 1999-00 allocation for transportation less expenditure in 1999-00 for transportation to provincial schools | x | 2000-01 day school ADE of the board / 1999-00 day school ADE of the board |

2000-01 Day school ADE includes enrolment of JK to OAC pupils of the board, excluding pupils 21 and over. 1999-00 day school ADE includes JK, SK and grade 1 to OAC pupils of the board, excluding pupils 21 and over.

**Allocation for transportation to provincial schools**

This allocation will be provided based on the expenditure by the board in 2000-01 that is approved by the Minister for the transportation of pupils to and from provincial schools.

Note that transportation funding is also provided for literacy and numeracy programs provided in the summer, under the Learning Opportunities allocation.

## 9. SCHOOL BOARD ADMINISTRATION & GOVERNANCE

This special purpose allocation provides funding for administration and governance costs, including the costs of operating board offices and central facilities. This category of funding provides for all board based staff and expenditures, including supervisory officers and their secretarial support. Funding will be provided for three components:

**1) Trustees**

Funding is based on the number of trustees, to fund trustee honoraria, expenses, meeting costs and professional development (for example, conferences). Dues to stakeholder organizations and secretarial costs for trustees are to be funded where necessary from board administration. The following amounts will be provided:

| | | |
|---|---|---|
| $5,000 | x | number of trustees (including Chair) for trustee honoraria |
| $5,000 | x | number of trustees (including Chair) for travel and expense allowance, professional development and other costs |
| $10,000 | per board as additional honoraria for the Chair and Vice Chair | |
| $5,000 | per board for student representation for travel and expenses but not honoraria | |

## 2) Directors and Supervisory Officers

Allocation is based on one director per board, and a number of supervisory officers based on board enrolment. The allocation is intended to cover salaries and benefits of these staff and also recognizes the higher administrative costs borne by boards based on circumstances reflected in their Remote and Rural allocation, Learning Opportunities allocation and New Pupil Places allocation.

This allocation has been adjusted to reflect the 1.95% increase to salary and benefit benchmarks.

The allocation for 2000-01 has also been revised from 1999-00 as shown in the table below to provide additional funding to small school boards.

Directors and supervisory officers component

| | 1999-2000 | 2000-2001 |
|---|---|---|
| Base amount | $200,000 | $418,000 |
| per pupil amount for first 10,000 pupils | $23 | $11 |
| per pupil amount for next 10,000 pupils | $23 | $16 |
| per pupil amount for next 5,000 pupils | $23 | $21 |
| per pupil amount for remaining pupils | $21 | $21 |
| % Remote and Rural allocation | 2% | 2% |
| % Learning Opportunities allocation | 0.5% | 0.5% |
| % New pupil places | 1% | 1% |

## 3) Board Administration Costs

This component provides funding for the business and other administrative functions of a board and the costs of operating and maintaining board offices and facilities. As in the Director and Supervisory Officers component, it recognizes the higher costs of administration in some boards. This component also covers expenses and support staff for the director and supervisory officers as well as support staff (where necessary) for trustees.

This component has been adjusted to reflect the 1.95% increase to salary and benefit benchmarks.

Funding will consist of:

Board administration component

| | 2000-2001 |
|---|---|
| Base amount | $80,940 |
| per pupil amount | $176 |
| % Remote and Rural allocation | 11% |
| % Learning Opportunities allocation | 0.5% |
| % New pupil places | 1% |

Enrolment used for determining the grants are day school ADE of pupils of the board (JK to OAC , excluding pupils 21 and over).

# PUPIL ACCOMMODATION ALLOCATION

The funding for Pupil Accommodation is made up of three components:

Allocation for school operation
Allocation for school renewal
Allocation for new pupil places

The allocation for school operation offsets the costs of operating (i.e., heating, lighting, maintaining and cleaning) schools; the allocation for school renewal offsets the costs of repairing and renovating schools; and the allocation for new pupil places enables boards that have demonstrated that they have fully utilized all existing school buildings effectively, and that their enrolment cannot be accommodated without new space, to construct new schools or additions. These allocations are calculated as follows:

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| *Total Grant for Pupil Accommodation* | | | = Grant for New Pupil Places | + Grant for School Renewal | + Grant for School Operation | | |
| *Grant for New Pupil Places* | = Enrolment in excess of Capacity | X Benchmark Area Requirement per Pupil | | X Benchmark Construction Cost per Sq. Ft. | X Geographic Adjustment Factor | | |
| *Grant for School Renewal* | = Enrolment | X Benchmark Area Requirement per Pupil | | X Supplementary School Area Factor | X Benchmark Renewal Cost per Sq. Ft. | Plus Top Up Funding for School Renewal* | |
| *Grant for School Operation* | = Enrolment | X Benchmark Area Requirement per Pupil | | X Supplementary School Area Factor | X Benchmark Operating Cost per Sq. Ft. | Plus Top Up Funding for School Operation* | |

* Top Up Funding is available for schools that are offering a regular day school program (exclusive of adult day school) and that are operating at less than full capacity.

The factors used to determine the Pupil Accommodation allocation are outlined below:

**Enrolment**

| | |
|---|---|
| Elementary Enrolment | "Day School Average Daily Enrolment" of pupils enrolled in Junior Kindergarten, Kindergarten and Grades 1 to 8 |
| Secondary Enrolment | "Day School Average Daily Enrolment" of pupils enrolled in Grades 9 through OAC, excluding students 21 years of age and older |
| Adult Enrolment* | "Day School Average Daily Enrolment" of students 21 years of age or older plus the "Average Daily Enrolment" of students enrolled in Continuing Education credit courses during the day (excluding pupils enrolled in correspondence self study programs, and including students in Summer School programs). |

* For Grants for School Operations and for Grants for School Renewal only.

**Benchmarks**

**Area Requirements Per Pupil - Elementary:** 100 square feet

Will provide sufficient teaching and ancillary space to permit the effective delivery of elementary school programming consistent with the average class size limits under the *Education Act*, and provide additional space required to accommodate the typical distribution of special education, learning opportunities and language (efor example, ESL etc.) programming.

**Area Requirements Per Pupil - Secondary:** 130 sq. feet

Will provide sufficient teaching and ancillary space to permit the effective delivery of secondary school programming consistent with the average class size limits under the *Education Act*, and provide additional space required to accommodate the typical distribution of special education, learning opportunities and language (for example, ESL etc.) programming.

**Area Requirements Per Pupil - Adult:** 100 sq. feet

Lower than the traditional secondary school panel because less additional space is required for special needs programs.

**Operating Cost:** $5.20 per square foot

Reflects the median custodial and maintenance expenditures per square foot.

**Renewal Cost:** weighted average of $0.64 and $0.96 per square foot for schools under and over 20 years of age respectively.

**Construction Cost, Elementary:** $11.00 per square foot (represents an estimated cost of $117 per square foot including fees and taxes to construct, furnish and equip new elementary schools amortized over 25 years).

**Construction Cost, Secondary:** $12.00 per square foot (represents an estimated cost of $126 per square foot including fees and taxes to construct, furnish and equip new secondary schools amortized over 25 years).

**Geographic Adjustment Factor**

A Geographic Adjustment Factor is applied to the Allocation for New Pupil Places in recognition of differences in construction costs across the province. The Geographic Adjustment Factor is based on the distance component of the Remote and Rural Boards Allocation.

No explicit geographic adjustment is being applied to the Grant for School Renewal and the Grant for School Operation. The funding model includes a number of special purpose grants that address unique circumstances faced by individual boards. In determining the Small Schools allocation, the Remote and Rural allocation and the Early Learning allocation, allowance has been made for custodial and maintenance costs.

**Supplementary Area Factor**

An adjustment factor is applied in the calculation of the Allocation for School Operation and the Allocation for School Renewal. This factor recognizes unique design features of a board's schools, such as wide hallways, large shop spaces and auditorium space for example, and the additional space needs of special education programming.

The factor is based on information compiled in the School Facilities Inventory System. Separate factors which reflect the area per pupil place are calculated for elementary and secondary schools.

**Top Up Funding to Reflect a 20 Percent Adjustment to Capacity Levels**

Additional funding is also provided for school operations and renewal for schools that are operating at less than full capacity. Top-up funding is calculated on a school-by-school basis for schools offering a regular day-school program (exclusive of adult day-school). This additional funding, which is not to exceed the revenue generated by enrolment equal

to 20 percent of school capacity, increases total revenue for school operations and renewal for a school up to the amount that would be generated if the school was operating at full capacity.

**Inter-Board Transfer of Schools**

The regulation includes provisions relating to schools transferred between boards, to make more effective use of existing school facilities. Provided that the prior approval of the Minister has been obtained, the capacity figure for a transferred school would be the lesser of actual enrolment (ADE) and the rated capacity of the facility. Transfers must meet the following criteria:

- the transfer is consistent with the boards' long term accommodation plan;
- the transfer benefits students from both boards (i.e. through improved facilities; reduced transportation needs etc.)
- the transfer results in more effective use of existing public assets; and
- the transfer reduces the need for the boards to construct new school facilities in their jurisdictions.

This "floating" capacity, which will apply only for purposes of calculating the Allocation for New Pupil Places, will remain in effect until such time as enrolment levels in the school reach the rated capacity level for the facility. After that time, the rated capacity for the facility will be used in the determination of the board's grants.

**$20 Million Cap**

To ensure an orderly transition to student-focused funding as boards began to address the significant backlog of accommodation issues across the province, annual Allocations for New Pupil Places for an individual board were limited to $20 million for an interim period. The regulation includes provisions for the removal of this cap. Specifically, the cap will be removed after a board has demonstrated that it has begun construction on projects costing at least $200 million since the introduction of student-focused funding using the New School Facilities Report component of the accountability framework for the Pupil Accommodation Grant. If the $200 million target has been achieved prior to the start of an academic year, the cap will be removed in that academic year (for example, if the target is met prior to September 1, 2000, the cap will be removed for the 2000-01 academic year). The amount that had been withheld from boards which had been affected by the $20 million cap will be paid over a 25-year period beginning in the academic year in which the cap is removed.

**Outstanding Capital Commitments**

In January 1997, the Minister of Education and Training announced a $650M capital program for the years 1997-98 and 1998-99. In 1999-00, the outstanding capital commitments from this program were converted to pupil places so that the amount owed to boards could be paid in the same manner as the Allocation for New Pupil Places. The

regulation includes provisions to allow boards to receive annual payments which would meet the cost of financing the outstanding grant amount over a twenty-five year period.

**Debt Charges**
The Ontario Budget delivered on May 5, 1998 indicated that the Province will provide funding to school boards to meet their capital related debt service costs for the next three years (1998-99, 1999-00, 2000-01). Beyond the three year period, school boards will be responsible for their capital debt service costs and will be able to include these debt service costs in their annual calculation of funding entitlements under the Pupil Accommodation Grant.

This will include the capital-related debt (i.e. debentures, long term capital loans and capital not permanently financed) incurred by boards prior to December 31, 1996 and debt incurred or which will be incurred for capital commitments that had been made as of May 14, 1998. Commitments made after May 14, 1998 for projects not previously approved by the Ministry or by the Education Improvement Commission will be the sole responsibility of the board.

A committee of board and ministry personnel has collected information regarding the capital-related debt for each board. Recommendations regarding funding to service capital-related debt will be based on that information.

## PHASE-IN OF STUDENT-FOCUSED FUNDING

Student-focused funding was introduced in 1998-99, and is being phased-in so that boards will not experience decreases in revenue from 1999-00 to 2000-01 due to the funding model exceeding 4% per year .

Boards revenue will not decrease by more than 4%, calculated either on the basis of total operating expenditures, or total per-pupil operating expenditures.

Where the decrease in revenue is more than 4%, a phase-in grant adjustment for the difference will be made to the board's grant allocation (often called positive mitigation). Boards will receive additional revenue to bring them to the 4% floor.

In 2000-01, phase-in provisions for boards whose operating revenue increases by more than 4% (often called negative mitigation) is eliminated. Boards will not be subject to a limitation on their increase in revenue over last year.

All revenues are subject to positive mitigation in 2000-01. Changes in capital revenue are not included in the calculation. The OMERS recovery is applied after the phase-in calculation.

**Determination of phase-in adjustment**

The 1999-2000 operating revenue for the purposes of the phase-in calculations is:

Total allocations in 1999-2000;

Less allocations for new pupil places, school renewal, debt charges, and prior capital commitments;

Plus phase-in adjustment and the stable funding guarantee.

The 2000-01 operating revenue for the purposes of calculating phase-in is

Total allocations in 2000-01 before phase-in funding and the OMERS recovery;

Less allocations for new pupil places, school renewal, debt charges, and prior capital commitments.

**Change in operating revenue**

$$\text{Change in operating revenue} = \frac{\text{Operating revenue for 2000 - 01}}{\text{Operating revenue for 1999 - 00}}$$

$$\text{Adjusted change in operating revenue} = \text{Change in operating revenue} \times \frac{\text{1999 - 00 ADE}}{\text{2000 - 01 ADE}}$$

Where:

2000-01 ADE is the 2000-01 day school ADE of pupils of the board enrolled in K to grade 12/OAC, excluding pupils aged 21 and over.

1999-00 ADE is the 1999-00 day school ADE of pupils of the board enrolled in K to grade 12/OAC, excluding pupils aged 21 and over.

(Pupils of the board exclude Visa students, Native students and students from out of province.)

**Calculation of phase-in funding amount**

If a board's change in operating revenue or its adjusted change in operating revenue is less than 0.96, then the board's allocation for 2000-01 will be increased by the greater of:

(a) (0.96 - board's change in operating revenue) x 1999-00 operating revenue

or

(b) (0.96 - board's adjusted change in operating revenue) x 1999-00 operating revenue

## ENROLMENT

Under the fiscal year reporting covering the period September to August, the calculation of average daily enrolment (ADE) will be based on the existing two count dates within the boards' fiscal year: October 31 and March 31. The full-time equivalent of pupils enrolled in a board's schools will be weighted at 0.5 for each of the count dates.

JK and SK pupils are counted as half time in the determination of ADE for 2000-01, with the exception of combined Kindergarten programs. The ADE regulation has been amended for 2000-01 to allow combined JK and SK programs, where JK students can be counted as enrolled for 600 minutes per week and SK students as enrolled for 900 minutes per week (with the exception of calculations for the Early Learning Grant).

ADE for continuing education programs and summer school will be calculated using the same parameters as in the previous year (with the exception of parameters for correspondence self-study courses, which have been made consistent with other continuing education programs).

## FEES

Boards are required to continue charging tuition fees in respect of non-resident Visa students, Native students and students from out of province.

Boards are able to determine the fees that they will charge in respect of Visa students for regular day school programs, continuing education and summer school programs.

The provisions for fees in respect of pupils whose parents or guardians reside on tax exempt land will be maintained at $40 per month per family.

## REPORTING AND ACCOUNTABILITY

With the release of the grant regulations in March 2000, the ministry has established the following reporting dates for the upcoming year:

| | |
|---|---|
| June 30 | Board 2000-01 estimates to be submitted to the Province |
| November 30 | Board 1999-00 Financial Statements to be submitted by boards to the Province |
| November 30 | Board 2000-01 revised estimates to be submitted to the Province |

## ENVELOPING

School boards will continue to be responsible for setting their budgets. Ontario's new approach to funding recognizes that school boards need the flexibility to decide how best to allocate resources within those budgets. At the same time there will be some restrictions (in only four broad areas) on how school boards can use some components of their funding. Limitations, as detailed below, are set on: the transfer between classroom and non-classroom spending; special education; new pupil places and facilities renewal; and school board administration and governance.

**1. Funds may not be moved from the classroom to non-classroom category.**

School boards are expected to place a priority on students and teachers in the classroom, and to find efficiencies in non-classroom areas. To support this objective, funds may be moved from non-classroom categories into classroom spending but may not be moved from classroom spending to non-classroom.

There is, however, no provincial requirement for boards to align their spending to the individual components ***within*** the classroom and non-classroom groupings except as noted in 3 and 4 below. It is the responsibility of the board to see that the most effective allocation of funds is made among the classroom or non-classroom components, within the local context.

Where a board does not spend its total 2000-01 classroom expenditure allocation in the classroom, the excess must be placed in a reserve fund for classroom expenditures. This is a new requirement for a classroom reserve fund.

**2. The special education allocation establishes the minimum that each board must spend on special education.**

The allocation for special education is enveloped and protected. The types of spending for which the grant may be used, and the list of allowed costs as defined by the ministry will apply to the 2000-01 school year. Boards are free to spend more on special education. Boards are required to place any unspent funds from the special education allocation in a special education reserve fund.

**3. The allocations for new pupil places and for facilities renewal establish the minimum that each board must spend on these components.**

This restriction is intended to ensure that boards are able to dedicate their resources to the creation and renewal of safe and functional facilities where students can learn.

Boards have significant flexibility on how this is done - whether through major renovation, replacement, leasing, additions, or other partnership agreements. Unspent funds in any particular year from these two grants are to be placed in a reserve to be restricted for these purposes in future as this level of funding is needed to ensure the physical integrity and safety of school buildings.

**4. The allocation for school board administration and governance establishes the maximum that each board may spend on these functions.**

Boards which could not achieve the target level in 1998-99 were required to submit to the Ministry a plan outlining how they intend to be in full compliance by the year 2000-2001. In 2000-01 boards will be required to comply with this enveloping provision.

Boards will be free to move funds within the three components of the allocation for board administration and governance as long as they comply with the levels established on trustee compensation under the Education Act.

The model is not intended to specify every expenditure that boards make. It is up to boards, as it always has been, to determine their detailed budget commitments within the terms of the Education Act and other relevant regulations and memoranda.

## GRANTS FOR 2000-01

Grants for 2000-01 will be calculated by deducting from the allocations calculated in the previous sections of this paper the tax revenue for 2000-01. Tax revenue will be based on 38% of 2000 taxes and 62% of 2001 taxes, plus 2000 supplementary taxes less 2000 tax write-offs.

For boards that include territory without municipal organization, the ministry will permit these boards to deduct actual costs for trustee elections in 2000 from property tax revenue. Boards will have the flexibility to enter partnerships with other boards or adjacent municipalities to run elections efficiently.

Where there is a strike or withdrawal of services during the 2000-01 school year, the grants will be adjusted by the net savings resulting from the strike or withdrawal of services.

The 2000-01 grants will be adjusted for the OMERS savings. As part of the Estimates forms to be released shortly, the ministry will require boards to provide information that identifies the amount of their OMERS savings. The ministry will recover these savings through a reduction to each board's total student-focused funding allocation.